

2015 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Air Passengers 2015 (000's of enplanements and deplanements) ¹													
Edmonton International Total	582.1p	561.6p	613.8p										1,757.4p
Per cent change from 2014	-0.3%	-1.0%	-1.8%										-1.1%
Domestic	398.2p	360.9p	421.4p										1,200.5p
Per cent change from 2014	-2.7%	-2.9%	-1.3%										-2.3%
Transborder	118.2p	119.7p	129.1p										367.1p
Per cent change from 2014	-0.3%	-3.0%	-7.8%										-3.9%
International	65.7p	61.0p	63.2p										189.9p
Per cent change from 2014	16.8%	17.9%	9.8%										14.7%
Calgary International Total	1,199.0p	1,149.2p											2,348.3p
Per cent change from 2014	2.3%	-0.4%											1.0%
Domestic	800.6p	765.0p											1,565.7p
Per cent change from 2014	1.1%	-0.9%											0.2%
Transborder	254.6p	253.4p											508.1p
Per cent change from 2014	1.8%	-3.0%											-0.6%
International	143.8p	130.8p											274.6p
Per cent change from 2014	9.9%	8.0%											9.0%
Highway Count 2014 (000's of vehicles) ²													
Hwy 1 - Sask border w-bound	55.9p	56.0p	62.3p	71.5p	77.3p	83.6p	104.0p	110.5p	79.2p	81.7p	64.4p	72.2p	918.6p
Per cent change from 2013	1.1%	0.0%	-2.2%	9.2%	-1.7%	8.2%	0.9%	1.7%	-1.6%	1.6%	-2.3%	8.7%	1.9%
Hwy 1 - Banff Pk Gate (2-way)	473.0p	449.1p	499.1p	532.4p	586.2p	659.8p	881.7p	982.6p	645.7p	563.7p	408.5p	529.7p	7,211.5p
Per cent change from 2013	3.4%	-4.9%	-6.8%	15.8%	1.1%	44.1%	12.7%	4.8%	-1.3%	8.0%	1.2%	11.6%	7.0%
Hwy 16 - Jasper Pk Gate (2 way)	91.8p	84.7p	105.2p	124.6p	139.5p	162.0p	224.4p	264.8p	154.4p	125.3p	83.6p	108.4p	1,668.7p
Per cent change from 2013	2.1%	-2.0%	-6.8%	16.1%	2.3%	-8.1%	5.3%	7.1%	-1.0%	5.8%	3.2%	16.3%	3.1%
Hwy 16 - Jct #897 w-bound	169.6p	157.6p	182.7p	187.5p	200.7p	200.0p	219.9p	223.3p	202.5p	210.4p	176.4p	180.3p	2,312.9p
Per cent change from 2013	2.8%	-1.6%	3.7%	4.8%	0.2%	0.7%	2.3%	0.8%	0.3%	1.6%	-0.9%	7.3%	1.8%
National Park Attendance (000's of person visits) 2015 ³ Does not include Group Tours.													
Banff	184.9p	188.6p	203.8p										577.3p
Per cent change from 2014	8.1%	14.6%	10.7%										11.1%
Jasper	52.8p	53.6p	64.1p										170.5p
Per cent change from 2014	6.0%	11.1%	7.4%										8.1%
Waterton Lakes	6.7p	7.5p	9.3p										23.5p
Per cent change from 2014	3.5%	19.1%	47.6%										23.0%

Sources: Edmonton International Airport, Calgary International Airport, Alberta Transportation, Parks Canada

New monthly figures are shown in bold type. Revisions will be bolded.

p=preliminary

r=revised

2015 Alberta Tourism Market Monitor

Alberta Culture and Tourism

	Jan.	Feb.	Mar.	Apr.	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Yr-to-Date
Employment (000's of persons) 2015 Seasonally Adjusted ⁴													
Accommodation and Food Services	156.9p	157.6p	155.9p										156.8p
Per cent change from 2014	4.4%	1.5%	3.7%										3.2%
Accommodation Indices 2015 ⁵													
Edmonton Occupancy Rate	54.4%	65.3%											59.6%
Point change from 2014	-3.9	-2.8											-3.4
Average Daily Room Rate	\$131.29	\$134.52											\$132.98
Calgary Occupancy Rate	55.0%	61.8%											58.3%
Point change from 2014	-3.0	-1.6											-2.3
Average Daily Room Rate	\$156.48	\$156.30											\$156.39
Alberta Resorts Occupancy Rate	40.8%	53.3%											46.7%
Point change from 2014	2.8	7.8											5.1
Average Daily Room Rate	\$193.23	\$177.96											\$180.37
Other Alberta* Occupancy Rate	52.5%	55.0%											53.6%
Point change from 2014	-7.5	-11.5											-9.5
Average Daily Room Rate	\$133.36	\$132.26											\$132.73
Total Alberta (excluding Resorts) Occupancy Rate	53.8%	60.0%											56.7%
Point change from 2014	-5.2	-6											-5.6
Average Daily Room Rate	\$139.70	\$140.35											\$140.01
Food Services and Drinking Places 2015 (\$ Millions) unadjusted ⁶													
Total Receipts for Alberta	691.6p												691.6p
Per cent change from 2014	6.4%												6.4%
Historic Sites and Museums 2015 (000's of person visits) ⁷													
Visitor Attendance	24.3p	42.4r	48.6p										115.3p
Per cent change from 2014	3.4%	6.5%	26.2%										13.3%
Sources: Statistics Canada, PKF Consulting Inc, Alberta Culture													

New monthly figures are shown in bold type. Revisions will be bolded.

p=preliminary

r=revised

Definitions of Indicators

Alberta Tourism Market Monitor

1. Air Passengers - Numbers are preliminary estimates of the number of air passengers enplaning and deplaning at the Edmonton International and Calgary International Airports.

Source: Edmonton International Airport and Calgary International Airport Websites

2. Highway Traffic - These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders counts all vehicles by direction. Year-to-date is a cumulative total for Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

3. National Park Attendance - Attendance is reported as the number of visits to National Parks in Alberta. Data are preliminary unless otherwise noted.

Beginning in 2004 the monthly figures for Banff National Park and Jasper National Park reflect independent travellers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor.

Source: Parks Canada

4. Employment Food and Accommodation Sector - The employment figure represents all persons who worked for pay or profit or unpaid work in the food services and accommodation sector, including businesses or other ventures owned or operated by a related family member(s) during the reference period of the survey. The year-to-date total is an average for the year.

Source: Statistics Canada, Labour Force Survey

5. Accommodation Indices - Occupancy rates and average daily room rates are based on monthly averages of all reporting hotels, motels and motor hotels in each designated region. Alberta Resorts includes the resort communities of Banff, Lake Louise, Kananaskis, Canmore and Jasper.

Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com

6. Food Services and Drinking Places - The monthly survey of Food Services and Drinking Places provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population is the 3 digit NAICS level of 722, which includes: Full-service restaurants, limited service eating places, special food places and drinking places. The year-to-date total is an average for the year.

Source: Statistics Canada, Food Services and Drinking Places

7. Historic Sites and Museums - Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station.

Source: Alberta Culture and Tourism, Heritage Division.

Alberta Tourism Market Monitor

Monthly
Update



April 2015

For the period of January to February 2015, the occupancy rate for Alberta (excluding resorts) was 56.7%, down 5.6 points from the same period in 2014 (62.3%). For the year-to-date 2015, the average daily room rate for Alberta (excluding resorts) was \$140.01, up 0.7% compared to the same period in 2014 (\$139.10).

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total 2015
Edmonton Occupancy Rate	54.4%	65.3%											59.6%
Point Change from 2014	-3.9	-2.8											-3.4
Average Daily Room Rate	\$131.29	\$134.52											\$132.98
Variance from 2014	1.4%	1.0%											1.2%
Calgary Occupancy Rate	55.0%	61.8%											58.3%
Point Change from 2014	-3.0	-1.6											-2.3
Average Daily Room Rate	\$156.48	\$156.30											\$156.39
Variance from 2014	-0.4%	-3.3%											-1.9%
Alberta Resorts Occupancy Rate	40.8%	53.3%											46.7%
Point Change from 2014	2.8	7.8											5.1
Average Daily Room Rate	\$183.23	177.86											\$180.37
Variance from 2014	10.5%	1.3%											5.5%
Other Alberta* Occupancy Rate	52.5%	55.0%											53.6%
Point Change from 2014	-7.5	-11.5											-9.5
Average Daily Room Rate	\$133.36	\$132.26											\$132.73
Variance from 2014	2.7%	1.1%											1.9%
Total Alberta (excluding Resorts) Occupancy Rate	53.8%	60.0%											56.7%
Point Change from 2014	-5.2	-6.0											-5.6
Average Daily Room Rate	\$139.70	\$140.35											\$140.01
Variance from 2014	1.4%	0.0%											0.7%

*Includes Lethbridge, Red Deer and other Alberta communities.

Source: PKF Consulting Inc.

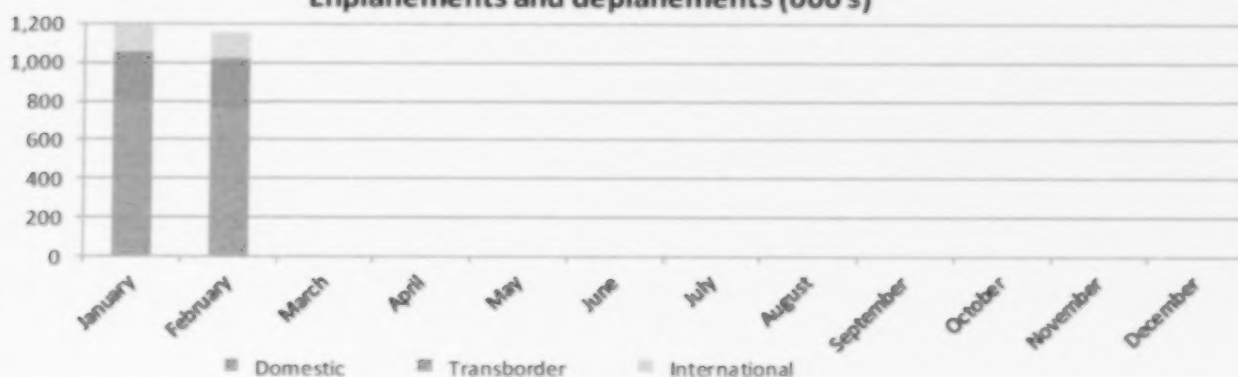
Alberta
Government

Air Passengers 2015 (enplanements and deplanements)

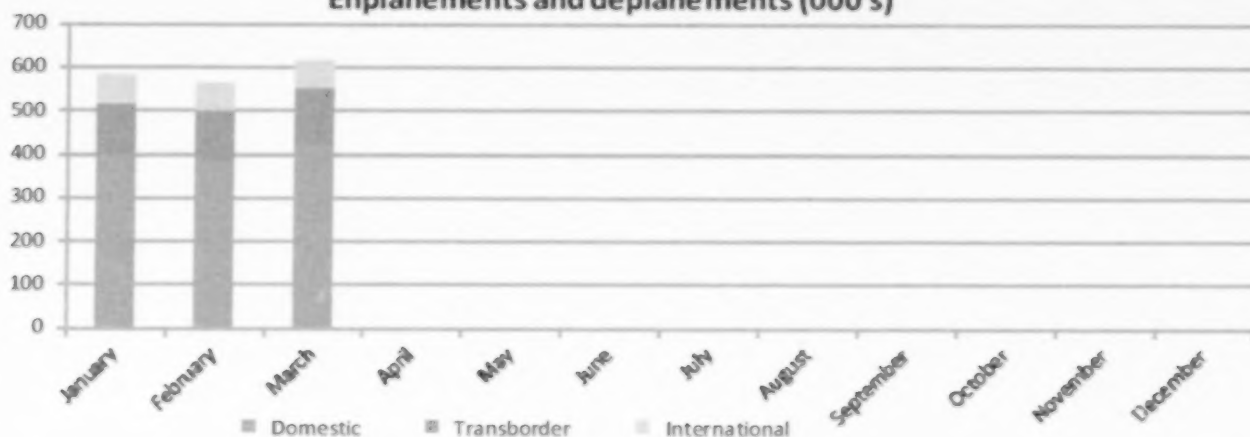
Calgary International Airport reported that 1.149 million passengers either boarded or deplaned at the airport in February 2015, a 0.4% drop compared to February 2014. International (overseas) passenger traffic increased by 8.0%, while domestic passenger air traffic decreased by 0.9% and transborder passenger traffic decreased by 3.0%, compared to February 2014.

Edmonton International Airport reported that 613,800 passengers either boarded or deplaned at the airport in March 2015, a 1.8% decrease compared to March 2014. Domestic passenger air traffic declined by 1.3%, transborder passenger traffic decreased by 7.8%, and international (overseas) passenger air traffic increased by 9.8% compared to March 2014.

Calgary International Airport 2015
Enplanements and deplanements (000's)



Edmonton International Airport 2015
Enplanements and deplanements (000's)

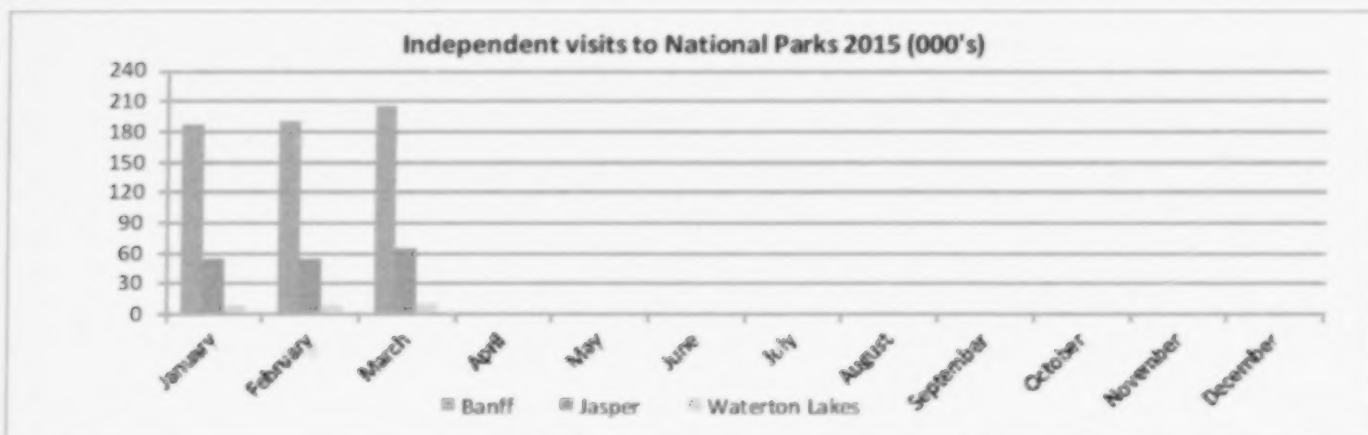


Source: Edmonton International Airport and Calgary Airport Authority

National Park Attendance 2015 (000's of person-visits) Group Tours not included

For March 2015:

- Banff National Park received 203,779 independent visitors, an increase of 10.7% compared to March 2014.
- Jasper National Park received 64,102 independent visitors, an increase of 7.4% compared to March 2014.
- Waterton Lakes National Park received 9,282 independent visitors, an increase of 47.6% compared to March 2014.



Historic Sites and Museums 2015 (000's of person-visits)

2015	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Y-T-D Total
Visitor Attendance	24.3	42.4	48.6										115.3
% Change from 2014	3.4%	6.5%	26.2										13.3%

Source: Alberta Culture and Tourism, Heritage Division.

Employment 2015 (000's of persons)

Employment in the Accommodation, Food and Beverage sector in Alberta increased by 3.7% in March 2015, compared to March 2014.

Preliminary-Seasonally Adjusted	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Accommodation, Food and Beverage	156.9	157.6	155.9										156.8
% Change from 2014	4.4%	1.5%	3.7%										3.2%

Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places 2015 (\$ Millions)

According to results from Statistics Canada's Food Services and Drinking Places survey, Alberta's unadjusted total receipts for January 2015 totaled \$691.6 million, an increase of 6.4% over January 2014.

Preliminary	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average Y-T-D Total
Total Receipts for Alberta	\$691.60												\$691.60
% Change from 2014	6.4%												6.4%

Source: Statistics Canada, Food Services and Drinking Places (Unadjusted).

Highway Traffic Count (000's of Vehicles) 2014

Preliminary	Hwy 1—Sask border w-bound	% Change from 2013	Hwy 1—Banff Pk Gate (2 way)	% Change from 2013	Hwy 16—Jasper Pk Gate (2 way)	% Change from 2013	Hwy 16—Jct #897 w-bound	% Change from 2013
January	55.9	1.1%	473.0	3.4%	91.8	2.1%	169.6	2.8%
February	56.0	0.0%	449.1	-4.9%	84.7	-2.0%	157.6	-1.6%
March	62.3	-2.2%	499.1	-6.8%	105.2	-6.8%	182.7	3.7%
April	71.5	9.2%	532.4	15.8%	124.6	16.1%	187.5	4.8%
May	77.3	-1.7%	586.2	1.1%	139.5	2.3%	200.7	0.2%
June	83.6	8.2%	659.8	44.1%	162.0	-8.1%	200.0	0.7%
July	104.0	0.9%	881.7	12.7%	224.4	5.3%	219.9	2.3%
August	110.5	1.7%	982.6	4.8%	264.8	7.1%	223.3	0.8%
September	79.2	-1.6%	645.7	-1.3%	154.4	-1.0%	202.5	0.3%
October	81.7	1.6%	563.7	8.0%	125.3	5.8%	210.4	1.6%
November	64.4	-2.3%	408.5	1.2%	83.6	3.2%	178.4	-0.9%
December	72.2	8.7%	529.7	11.6%	108.4	15.3%	180.3	7.3%
Year-To-Date	918.6	1.9%	7,211.5	7.0%	1,668.7	3.1%	2,312.9	1.8%

Source: Alberta Transportation.

Definitions of Indicators

Air Passengers—Data are preliminary estimates of the number of air passengers enplaning and deplaning. Source: Calgary Airport Authority and Edmonton International Airport (websites).

Highway Traffic—These data are monthly totals. The monthly average daily traffic (average number of vehicles per day) is calculated by dividing the monthly total by the number of days in the month passing the counter locations and in the direction indicated for a particular month. Automatic Traffic Recorders count all vehicles by direction. Year-to-date is a cumulative total for all vehicles. Source: Alberta Transportation's Automatic Traffic Recorders (ATR).

Accommodation Indices—Occupancy rates and average daily room rates are based on a sample of hotels for each respective location. Source: PKF Consulting Inc. with reproduction and use of information subject to PKF Disclaimer and Restrictions as detailed at www.pkfcanada.com.

Historic Sites and Museums—Visitor attendance figures are monthly totals based on fifteen historic sites, the Royal Alberta Museum, the Royal Tyrrell Museum of Paleontology, and the Tyrrell Field Station. Source: Alberta Culture and Tourism, Heritage Division.

National Park Attendance—Attendance is reported as the number of independent visits to National Parks in Alberta. Data are preliminary unless otherwise noted. Beginning in 2004, the monthly figures for Banff National Park and Jasper National Park reflected independent travelers only, and do not include people travelling as part of a tour group. The tour group data, however, are included in the annual edition of the Monthly Market Monitor. Source: Parks Canada.

Employment in the Food and Accommodation Sector—The employment figure represents all persons 15 years or older who worked for pay or profit or unpaid work in the food services and accommodation sectors, including businesses or other ventures owned or operated by a related family member during the reference period of the survey. The year-to-date figure is an average for the year. Employment figures are seasonally adjusted. Source: Statistics Canada, Labour Force Survey.

Food Services and Drinking Places—The monthly survey provides estimates of the value of sales and the number of locations of restaurants, caterers, and drinking places by province and by industry at the North American Industry Classification System (NAICS) four-digit level. Includes total receipts from restaurants, caterers and taverns for chain and independent establishments. The target population includes full-service restaurants, limited service eating places, special food places and drinking places. Data are unadjusted. The year-to-date figure is an average for the year. Source: Statistics Canada, Food Services and Drinking Places, CANSIM table: 355-0006.

Produced by: *Tourism Research and Evaluation Unit*
research.innovation@gov.ab.ca